

ATTACHMENT G

SOLICITATION 52PAPT201008

SCANNING INCOMING
CORRESPONDENCE INSTRUCTIONS

Prior to Scanning

1. Sort Papers
 - a. ALL Letters of Protest go to AC's office (Do Not Scan)
 - b. ALL TTAB papers go to TTAB (Do Not Scan)
 - c. All Applications go to that Document Prep Team
 - d. All postcards are labeled with the mail room date and serial number
 - e. All papers without a serial number or registration number do not get scanned. Check XSEARCH for a potential serial number.
 - A. Check the following in XSEARCH: Mark noted in letter [bi,ti]; owner name noted in letter[ow], by attorney's name [at].
 - f. All papers marked "Make Special" or "Petition to Make Special" or "Request to Make Special" handle as New Application, send for New Application processing
 - g. For "Express Mail" correspondence with no DATE IN on the slip and no ACCEPTANCE date on the website, deliver to Karen Smith prior to processing
2. Clean Up Documents
 - a. Take all staples out of document
 - b. Affix documents with paper clips
 - c. Place all documents with check, credit card authorization, deposit account information, in one pile; place all other documents in another. **DO NOT PROCESS PAPERS WITH CREDIT CARD INFORMATION.**
 - d. For papers with "Deposit Account" information, make 1 extra copy for Finance of the paper(s) authorizing the funds to be taken out of the "Deposit Account." (if one not provided already).
 - e. Sort by MAIL ROOM DATE, OLDEST FIRST
 - f. If any signatures are in blue or odd-colored ink, photocopy page and place with document
 - g. If there are any small pieces of paper, TAPE them on an 8 ½ x 11 piece of paper
 - h. If the specimen is attached to a piece of paper with staples, remove staples and TAPE onto the paper
 - i. If specimen is bulky attach "Bulky Specimen" Sheet to have the scanner scan to let the examiner know there is a bulky specimen. ???

Scanning Procedures

1. Turn on Tower and Monitor for computer
2. Turn on Printer
3. Make sure scanner light is on
4. Click on Incoming Correspondence Icon
5. Review Document – note the following:
 - a. Does the paper have a title in it?
 - b. Is there a cover letter? Check for additional papers
 - c. Is money associated with the paper?
 - d. Is the left corner frayed because of staples?
 - e. Are specimens are attached?
6. Highlight Document Type –
 - a. Click a Description
 - i. AP AC/PRU – Assistant Commissioner & Post Registration
 - ii. Assistant Commissioner's Office
 - iii. Intent to Use
 - iv. Law Office
 - v. LI LO/ITU – Law Office & Intent to Use
 - vi. LP LO/PRU – Law Office & Post Registration Unit
 - vii. Other
 - viii. Post Registration Unit
 - ix. Pre Exam
 - x. Publication and Issue
 - xi. Trademark Assistance Center

- b. Then Click a Routing Document
 - i. This varies for each office being routed to
 - 1. Use the title noted in the correspondence
 - 2. If there are multiple checks for different financial transactions, use both
- c. Select Mail Room Date
 - i. This date will stay in effect until it is changed
- d. Select Fee Atch?
 - i. Click Yes or No
- e. Enter Serial/Registration Number(s)
 - i. Reenter Number if not using BCR
- f. Enter SEND
 - i. If entering Registration Number use Enter key
- g. Check to make sure validated number and routing are correct
- h. Enter SCAN
 - i. Make sure that there are no credit card numbers to be scanned
- ii. For regular (black & white) sheets scan via feeder, print side down
 - 1. make sure that scanner is set for ADX Simplex and Black/White
 - 2. If left corner is frayed, can scan print side down, upside down. Once scanned, highlight each page and use ROTATE button to make the page right-side up.
 - 3. CHECK ALL PAGES
 - 4. Make Sure all pages were scanned. If you have six pages to be scanned make sure that six pages were scanned
 - 5. Make sure that all pages are NOT SKEWED. If there are skewed pages, then start all over again. Make sure that the feeder sides are very close to the page edges, so that the paper cannot wiggle around while the machine is feeding the page through.
 - 6. If some pages are ok and some are not, use DELETE button on the bad pages. Then use INSERT button – scanning will take place when you hit INSERT button – make sure that document is ready to be fed in scanning machine when you hit INSERT.
 - 7. If the pages are skewed, no matter what, then use flatbed procedure, below. AND Contact your supervisor if this happens for more than FIVE scanning procedures.
- iii. For color specimens
 - 1. Load item onto flatbed
 - 2. Hit APPEND button
 - 3. Scanning Page “Image Quality Control” click on “Settings”
 - 4. At “TWAIN DRIVER” – menu with a lot of items to be chosen -
 - 5. Click on Scan Type –
 - a. Arrow down and Click “FLAT BED,”
 - b. Go to “IMAGE MODE” and arrow down and click “COLOR”
 - c. Press SCAN (automatically will scan)
 - 6. For multiple “flat bed” scans, make sure last document scanned is highlighted so that the newest goes last.
- iv. For foreign registrations
 - 1. Take out all of fasteners, usually easiest to cut out brass holes with scissors
 - 2. At Scanning Page “Image Quality Control” click on “Settings”
 - 3. Click on Scan Type –
 - a. for specimens/color, click “FLAT BED,” “COLOR” and then SCAN
 - b. Make sure all pages of registration are copied, including page with ribbons and embossed seals
 - c. Check back of document to see if there are any signatures, if there are, copy that too

4. For multiple “flat bed” scans, make sure last document scanned is highlighted so that the newest goes last.
- v. For Multiple Filings under one cover letter and/or one check
 1. Copy cover letter for the number of filings. Example, if cover letter indicates that the package contains information about five separate applications/registrations, then copy cover letter four times
 2. Scan **each** document under its own serial/registration number. **DO NOT SCAN ALL UNDER ONE SERIAL NUMBER.**
 3. If the cover letter contains a check or credit card then “stair step” the scanned documents so that Revenue knows that the payment is to cover all of the attached documents. After revenue is done with the documents they can go on their own separate way.
 4. **REMEMBER DO NOT SCAN CHECKS OR CREDIT CARD INFORMATION**
- vi. For packages that have one serial number that will have documents going to different places, i.e., Request for Reinstatement (goes to Ass’t Commissioner’s office); Statement of Use (goes to ITU); and Extension of Time (goes to ITU)
 1. Copy cover letter for each document
 2. Scan each using the proper routing slip. Each document will have its own routing slip.
 3. “Stair step” the documents so that revenue will know that there are three different items.
 4. Remember do not scan checks or credit card information
- vii. For Documents that come in SKEWED
 1. Scan them individually on the flatbed so that they are captured un-skewed.
- viii. REVIEW WHAT HAS BEEN SCANNED
- ix. If acceptable, go back to SETTINGS and change back to ADF Simplex and Image Mode Black/White
- x. If acceptable, then SAVE (Currently if attempting to SAVE while color page is highlighted then an error will pop up – highlight a black and white page and SAVE again)
7. The printer will automatically print out a routing slip.
8. Attach Routing Slip to the papers in the following order:
 - a. Routing Slip
 - b. Payment, i.e., Check on Left Side of document, credit card slip, deposit account information, etc.
 - c. Papers
 - d. STAPLE **ONE TIME** on Left side, ensuring that the staple has all of the documents affixed and make sure that staple does not go through account information on check.
9. Place package into one of two bins
 - a. FEE ATTACHED
 - b. NO FEE ATTACHED
10. When beginning again, make sure that the bottom right corner of the screen says ADF and Bimodal – this means that the scanner is set up for documents to be fed through the feeder and that the scanned material will be black and white.

Begin again.

Procedures for Down Time:

Do all above, except for scanning.

Want to put in information about all of the buttons available when scanning, i.e., SCAN, Rotate, Append, Insert, etc.

Want to have pix of the screens.